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ABSTRACT

Southern Regional Education Board (SREB) states are experiencing teacher shortages in certain geographic and subject areas. Teacher preparation programs are not graduating enough students in certain subjects, and more teachers are approaching retirement eligibility. SREB states are seeking alternative sources of teachers to help relieve shortages. Several states allow retired teachers to return to teaching for pay while continuing to collect retirement benefits. Policies that allow this type of return to work are helping some states alleviate teacher shortages. Between the years 2000 and 2001, nearly 400 retired teachers returned to North Carolina's classrooms, and 500 returned to South Carolina's classrooms. Twelve SREB states allow retirees to return to classroom teaching the equivalent of full time while continuing to collect retirement benefits. Many of these states also allow retired teachers to work part time, in time-limited positions, or as substitute teachers while receiving retirement benefits. The other four states allow retirees to serve as part time or substitute teachers while receiving retirement benefits. A table outlines policies in the 12 SREB states that allow retirees to return to full-time teaching. It focuses on the separation period, time limitations for service after retirement, earning limitations, and status in the retirement program. (SM)

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Focus *on Retired Teachers: State Policies Allowing Retirees to Return to Classrooms*

SREB

Gale F. Gaines

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SREB states are experiencing shortages of teachers — in geographic areas and in subject areas such as math, science, special education and foreign languages. Graduates of teacher preparation programs tend to take jobs close to their universities, creating supply problems for other areas of the state. These programs also are not graduating enough students in subjects for which there are teacher shortages. In addition, more teachers are approaching retirement eligibility. In 1996, nearly 26 percent of U.S. teachers were more than 50 years old (up from 21 percent in 1986) and 38 percent had more than 20 years of experience (up from 27.7 percent 10 years earlier).

SREB states are looking to alternative sources of teachers to help relieve shortages. Several states allow retired teachers to return to work in classrooms and receive pay while continuing to collect their retirement benefits.

Is this a viable way to relieve shortages? Can these policies help states achieve their goals for education quality? Retirement experts say that retirees often take short breaks from work and then return to the work force. Considering the large number of teachers who soon will be eligible for retirement, experienced teachers may be a valuable resource in helping to fill shortages. Qualified retired teachers also have much to share with beginning teachers and can be useful in raising student achievement in low-performing classrooms and at low-performing schools.

Policies that allow retired teachers to return to classrooms without losing retirement benefits are helping some states to alleviate teacher shortages. For example, during 2000-2001 nearly 400 retired teachers returned to North Carolina's classrooms and more than 500 returned to classrooms in South Carolina. Both states expect participation to increase because of recent adjustments to laws allowing this practice.

Twelve SREB states (Arkansas, Florida, Kentucky, Louisiana, Maryland, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia and West Virginia) allow retirees to return to work as classroom teachers the equivalent of full time while continuing to collect retirement benefits. Many of these states also allow retired teachers to work part time, in time-limited positions or as substitute teachers while receiving retirement benefits. The other four SREB states — Alabama, Delaware, Georgia and Mississippi — allow retirees to serve as part-time or substitute teachers and continue receiving retirement benefits; these states have no provisions for full-time, year-round service.

The following table outlines policies in the 12 SREB states that allow retirees to return to teaching full time.

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State policies that allow retired teachers to return to teaching full time while collecting retirement benefits

State initiatives	Separation period[1]	Time limitations for service after retirement	Earning limitations	Status in the retirement system	Notes
Arkansas					
All retirees including teachers	30 days	No limit	Twice the maximum allowable salary designated by the Social Security Retirement Earnings Test[2]	Retirees neither contribute to the retirement system nor earn additional service credit.	
Retirees who teach in shortage areas, in low-performing schools or in positions declared essential	30 days	Total of three years; contract requires annual renewal	No limit with a waiver authorized by the Arkansas Teacher Retirement System Board of Trustees	Retirees neither contribute to the retirement system nor earn additional service credit.	School districts initiate waivers to remove earning limitations that apply to all retirees. This can be done only if the job vacancy has been posted and no qualified nonretired teachers are available. A retiree cannot be rehired in his/her previous position and must be certified in the shortage area in which he/she is teaching.
Florida					
All retirees including teachers	12 months	No limit	No limit	Retirees are treated as new employees and begin second retirement accounts.	After 30 days of retirement, retired teachers may work part time (up to 780 hours) without penalty until the 12-month period is over and they may begin working full time.
Kentucky					
Retirees who teach in shortage areas	12 months if employed by the same district; three months if employed by a different district	No limit; contract requires annual renewal	Retirees are paid according to the district's salary schedule, with a minimum salary set at the level for a teacher with a master's degree and 10 years of experience.	The employer and employee contribute to a new defined-contribution retirement account.	The district must make an annual effort to recruit a nonretired teacher or administrator prior to hiring a retiree or renewing his/her contract. Retirees hired by a district can account for no more than 1 percent of active teachers in the district's retirement system or two teachers, whichever is greater. The retiree must be certified for the position he/she assumes.
Louisiana					
Retirees returning as classroom teachers	12 months	Law authorizes multiyear contracts	Retirees are placed on the district's salary schedule based on their years of experience.	The retiree receives no additional service credit in the retirement system. Both the retiree and the employer contribute to the retirement system.	When the retiree's contract ends, he/she can apply for a refund of his/her contribution to the retirement system during re-employment. The employer's contribution is retained by the retirement system.
Maryland					

in low-performing schools				additional service credit.	or better. The retiree must have certification to teach in the state and must demonstrate satisfactory performance each year.
North Carolina					
Retired teachers	Six months	No limit; contract requires annual renewal	Salary is negotiated as part of the one-year contract, but teachers may not earn more than they would on the district's salary schedule.	Retirees neither contribute to the retirement system nor earn additional service credit.	The local board of education must determine that the retiree's performance is satisfactory.
Oklahoma					
Retired teachers	60 days	No limit	$15,000	Retirees neither contribute to the retirement system nor earn additional service credit.	
Retired teachers	36 months	No limit	$25,000		
South Carolina					
All retirees, including teachers	60 days	No limit	$50,000	Retirees neither contribute to the retirement system nor earn additional service credit. The district contributes to the retirement system on behalf of the retiree.	
Retirees who teach in shortage areas or in low-performing schools	No minimum	No limit	No limit	Retirees neither contribute to the retirement system nor earn additional service credit. The district contributes to the retirement system on behalf of the retiree.	The retiree must be certified in the subject he/she is teaching. The district must ensure that no qualified nonretired teacher is available to fill the position.
Tennessee					
Retirees who teach in shortage areas	12 months	No limit; contract requires annual renewal	Retirees must be paid no less than what teachers with no experience are paid, but they cannot receive more than 85 percent of the salaries for teachers with comparable years of experience.	Retirees neither contribute to the retirement system nor earn additional service credit.	The superintendent must certify that the retiree is fully qualified and that no qualified nonretired teacher is available.

[1] The amount of time between the official date of retirement and the date that the retiree can return to work.

[2] The Social Security Retirement Earnings Test limits earnings for people between the ages of 62 and 64 who draw Social Security benefits. For 2001-2002, the earnings limit is $10,680 per year. For 2002-2003, the limit will be $11,280 per year.

Note: Many of the SREB states mentioned above also allow retired teachers to work part time, in time-limited positions or as substitute teachers while receiving retirement benefits. Alabama, Delaware, Georgia and Mississippi allow retirees to serve as part-time or substitute teachers and continue to receive their retirement benefits; these states have no provisions for full-time, year-round service. The following states have separate retirement systems for education employees: Alabama, Arkansas, Georgia, Kentucky, Louisiana, Maryland, North Carolina, Oklahoma, Texas and West Virginia. Delaware, Florida, Mississippi, South Carolina, Tennessee and Virginia have one retirement system for all employees.

State policies that allow retired teachers to return to teaching full time while collecting retirement benefits

(continued)

State initiatives	Separation period[1]	Time limitations for service after retirement	Earning limitations	Status in the retirement system	Notes
Texas					
Retirees who teach in shortage areas	12 months	No limit	No limit	Retirees neither contribute to the retirement system nor earn additional service credit.	The retiree must be certified in the subject he/she is assigned to teach.
Any member of the Teacher Retirement System who retired prior to January 2001	30 days	No limit	No limit	Retirees neither contribute to the retirement system nor earn additional service credit.	
Virginia					
Retirees who teach in shortage areas	12 months	No limit	No limit	Retirees neither contribute to the retirement system nor earn additional service credit.	The retiree must derive at least part of his/her retirement benefit from service as an employee of a local school board and must be licensed by the state Board of Education.
West Virginia					
Retirees who teach in shortage areas	Until the beginning of the fiscal year following the year in which he/she retired	No limit: contract requires annual renewal	Retirees are paid as daily substitutes.	Retirees neither contribute to the retirement system nor earn additional service credit.	The state Board of Education must approve the hiring district's annually adopted policy that allows the use of retired teachers in shortage areas.

[1] The amount of time between the official date of retirement and the date that the retiree can return to work.

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